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ABSTRACT

Three phases of any change effort include initiation, implementation, and continuation. This seventh guidebook in a series of nine video conferences addresses later stages of implementation and continuation (initiation and early stages of implementation are discussed in the sixth guidebook.) In the guidebook are definitions of the three phases of change; a discussion of issues involved in carrying out implementation and continuation; an examination of three special attention issues--students' multicultural backgrounds, at-risk children's needs, and reform in rural and small schools; and a summary of the dynamics of change, which stresses fundamental reform as a cyclical process. Also included are pre- and post-conference activities, a program evaluation, essays and school-based activities highlighting conference topics, information about other video conferences in the series and computer forums, course credit information, a list of supplementary materials, 75 references, 9 organizational resources, and 9 regional resources. Biographical information is given on the conference presenters. (LMI)

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RESTRUCTURING TO PROMOTE LEARNING IN AMERICA'S SCHOOLS

A GUIDEBOOK

7 Many Roads To Fundamental Reform: Continuing the Journey

Presented by the

North Central Regional Educational Laboratory

and the

Public Broadcasting Service

U.S. DEPARTMENT OF EDUCATION
Office of Educational Research and Improvement
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Use of This *Guidebook*

Guidebook Purposes

1. **Before** the video conference, the ***Guidebook*** provides pre-conference activities.
2. **After** the video conference, the ***Guidebook*** contains a post-conference activity.
3. The essay highlights topics discussed during the video conference. It is followed by two sets of activities: one set relates directly to the essay; the other set is school-based.
4. Finally, this ***Guidebook*** provides information about the remaining video conferences in the series, the computer forums, course credit, and supplementary materials that are available for this professional development program.

Instructions to the Site Facilitator

Pre-Conference Activities
(Allow 30 minutes.)

Before viewing the video conference:

ASK the participants to introduce themselves. If possible, have them form small groups or pairs.

ASK the participants to complete the **Pre-Conference Activities.** These activities are on page 4 and are identified by the hand/pencil symbol: ✍

Post-Conference Activities
(Allow 30 minutes.)

After viewing the video conference:

ASK the participants to complete the **Post-Conference Activity**.

This activity is on page 6 and is also marked by ✍

ADVISE participants that workshop activities have been included in this ***Guidebook.*** These activities may be completed in schools, state education agencies, or other educational facilities.

Video Conference 7

MANY ROADS TO FUNDAMENTAL REFORM: CONTINUING THE JOURNEY

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Guidebooks and videotapes of these series may be purchased from:

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Guidebooks and additional information are also available from:

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NCREL

The North Central Regional Educational Laboratory is a nonprofit organization devoted to supporting efforts of the educational community by bridging the gap between research and practice to provide effective instruction for all students. NCREL is primarily funded through the Office of Educational Research and Improvement of the U.S. Department of Education. NCREL and PBS have been presenting national video conferences since 1987.

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OVERVIEW: PROFESSIONAL DEVELOPMENT SERIES

NCREL's Goal: A Forum on Restructuring Schools

The concept of educational laboratories emerged during the War on Poverty in the 1960s. Education was viewed as crucial to anti-poverty efforts, but the inability of policymakers, researchers, and practitioners to communicate with one another about effective strategies and practices was a significant obstacle to substantial educational improvement. One of the reasons Congress created the laboratories was to promote dialogue about promising practices among these diverse actors. Today there are nine federally funded regional educational laboratories in the country working to help educators and policymakers improve the quality of education by applying research findings to educational practice.

NCREL sees telecommunications as an effective vehicle for creating a forum on restructuring schools that brings together practitioners, policymakers, and researchers so that they can enrich each other's perspectives. Telecommunications can bridge geographic separations and create networks of common stakeholders in restructuring efforts.

However, the satellite transmission itself does not create a forum. How the telecommunications event is structured is a crucial factor in determining the effectiveness of the forum. This professional development series was designed to:

- Focus the movement for restructuring schools on the fundamental issues of schooling: learning, curriculum, instruction, and assessment
- Provide opportunities for participants to interact with researchers, teachers and administrators, and policymakers in a structured thinking process
- Help apply new ideas and develop local expertise
- Promote a broad range of local and electronic networking
- Help educators prepare students to meet the new roles and opportunities of a profoundly changed and changing society
- Provide a framework for organizing what research says about fundamental change

Components of the Professional Development Series

Four components of this professional development series enhance the potential for creating a national forum:

1. Video conferences
2. Computer forums
3. Print materials
4. College credit

See Additional Information, page 46.

Video Conference Titles and Dates (1990)

1. The New Definition of Learning: The First Step for School Reform (February 14)
2. The Thinking Curriculum (March 21)
3. The Collaborative Classroom: Reconnecting Teachers and Learners (April 26)
4. Multidimensional Assessment: Strategies for Schools (May 24)
5. Schools as Learning Communities (June 6)
6. Many Roads to Fundamental Reform: Getting Started (June 20)
7. Many Roads to Fundamental Reform: Continuing to Grow (July 11)
8. The Meaning of Staff Development in the 21st Century (July 25)
9. Reconnecting Students at Risk to the Learning Process (August 8)

Content

The core message of the video series is this: A fundamental restructuring of schools should be driven by a new vision of learning, a vision which transforms all dimensions of schooling. Thus, the first video conference focuses on the new research on learning. The next three video conferences discuss the cognitive and social environments that can be created in classrooms to support meaningful learning. The last five video conferences explore changes that can be made in the social organization of schools to support these classrooms.

VIDEO CONFERENCE ACTIVITIES

Pre-Conference Activities

Post-Conference Activity

Pre-Conference Activities

INSTRUCTIONS TO SITE FACILITATOR:

ASK the audience to form groups of 3 to 5 people. GUIDE them through the Pre-Conference Activities.

Activity 1: What makes reform efforts last?
(Allow 15 minutes.)

DESCRIBE a reform effort you have experienced that has lasted at least five years. If you have not had such a reform effort in your school or district, describe one you are aware of in another school or district.

BRAINSTORM in your group some factors that influenced the longevity of the reform effort. Consider factors such as the vision and scope of the reform effort, leadership, funding, district policies, staff development, strategies for consensus building, coping strategies, and monitoring and evaluation activities. WRITE your ideas below.

Activity 2: What is this video conference about?
(Allow 5 minutes.)

SURVEY the essay, activities, and biographies in this guide to PREDICT what you will learn in this video conference. WRITE your predictions below. SHARE your predictions with a partner or group if possible.

What are your goals for viewing this video conference?
(Allow 5 minutes.)

WRITE your goals for viewing Video Conference 7.

Post-Conference Activity

INSTRUCTIONS TO SITE FACILITATOR:

ASK the audience to form groups of 3 to 5 people. GUIDE them through the Post-Conference Activity.

Activity: What additional factors make reform last?

USE the ideas you learned in the video conference to elaborate and add to your ideas about why a reform effort you have experienced (or one you are aware of) was successful for five years or longer. SHARE your ideas with a partner or group if possible.

Ideas from City Magnet School

Ideas from Goodlad and Sizer

Ideas from the panel

Ideas from Perry and Towner

Ideas from Walters Elementary School (rural)

Ideas from Fairdale High School

Ideas from urban example

Essay

MANY ROADS TO FUNDAMENTAL REFORM: CONTINUING THE JOURNEY

What Are the Three Phases of Change Efforts?

How Can We Make Implementation Work?

How Can We Ensure That Reform Efforts Continue?

What Special Factors Influence Fundamental Reform?

What Are the Critical Issues in Fundamental Reform?

What Are the Three Phases of Change Efforts?

Introduction

In ***Guidebook 6*** we talked at some length about the need for new and multiple maps to navigate the complex network of roads that lead to fundamental educational reform. We said that it's not simply a matter of discarding the old, narrowly defined maps that show the way to isolated school improvement destinations. Rather, the need is for locating school improvements in the much broader context of an educational universe that has children at the center. Further, we believe that **the educational universe is a dynamic system, and that a systems approach to planning and managing fundamental reform is necessary in order to make sense of the multiple, simultaneous, and interrelated changes that occur in our schools.**

It is no small feat to question and counter the whole conception of schooling and school improvement as they have been understood and practiced for generations. Our primary purpose in both essays is to demonstrate that the tasks involved in fundamental reform are do-able and manageable. Much of the content in both ***Guidebooks*** is related to **the three major phases that are evident in any change effort: Initiation, Implementation, and Continuation.** There is overlap between the two essays, with ***Guidebook 6*** addressing initiation and early implementation, and this one focusing on later implementation and continuation. The overlap is intentional, for the three phases are not distinctly separate from each other; each is connected to and affected by the others, and some tasks in adjacent phases will occur simultaneously.

Further, the dynamic and systemic nature of fundamental reform means that we shouldn't be viewing the three phases as merely a linear process. Rather, the phases are cyclical, and your evaluation of implementation efforts should lead to a branching decision point—to the continuation of some practices and programs that prove to be worthwhile, and to initiation of new efforts in place of other reform components that do not live up to your expectations.

To provide a context for this essay, we begin with brief definitions of the three phases. The next two sections address the major issues involved in carrying out implementation and continuation of reform efforts. We then turn to a discussion of three issues that call for special attention, two of them generic—the multicultural

backgrounds of students, and the needs of at-risk children; and one of them more narrowly defined—what it means to undertake fundamental reform in rural and small schools. By way of summarizing the dynamics of change, the final section recaps key dimensions of change that cut across the phases of reform efforts.

Phases of Change Efforts

As we mentioned previously, there are three major phases that are evident in any change effort.

1. Initiation

Sometimes labeled *adoption* or *mobilization*, **initiation** begins with awareness of the potential for change and leads up to the decision to adopt a new practice or proceed with a plan. This phase may start in a variety of ways: the catalyst may be a staff or curriculum developer returning from a conference with a promising new practice; a group of teachers might be comparing teaching styles and decided that their students would benefit from multiple styles in the same classroom; or the school board might issue a mandate in response to community pressure.

Initiation is a period of inquiry, reflection, and planning by decision makers and program developers—of weighing preliminary decisions about the need for change, of gauging interest for a particular idea, of determining what kind of priority the change deserves, and of considering some of the administrative requirements such as costs, materials, personnel, space, and the like.

2. Implementation

Implementation encompasses the first two to three years' experience of putting the change into practice. Unfortunately, most of the attention and resources for implementation issues are concentrated on the first few months. At one time or another, each of us has fallen victim to the typical front-loaded implementation "plan": The decision to adopt a new practice triggers our presence at The Awareness Session, quickly followed by The Inservice Training Program, where we also receive The Clearly-Tabbed User's Manual that will answer all the questions we didn't quite understand during the inservice. Training in mind and manual in hand, we go forth Duly Certified to Achieve Greater Outcomes.

This all too common experience is an example of change perceived as an event. We know, however, that **change is a process**, and people will need plenty of time for practice and mastery of their new knowledge, skills, and behaviors.

3. Continuation

The third phase, **continuation,** has most often been called "institutionalization," to denote whether or not an improvement effort has been incorporated into the routine way of going about schooling, and into regular budgets, policies, curriculum guidelines, and the like. But in the context of restructuring the term "institutionalization" seems inappropriate and bureaucratic. Instead, fundamental reform is an ongoing process that is intended to promote constant growth and renewal of the system rather than a fixed stopping point for reform.

At the same time, *institutionalization* is still an important concept when it comes to the specific programs and practices that make up fundamental reform. Most people working with a new practice are pleased with themselves and others if they get through the first year or two successfully. By that time, most concerns about management have disappeared, and concerns about the impact of the change on learners are emerging. But it may be too soon to celebrate. There is an element of excitement to implementation, but when it fades people can lose interest in sustaining the new program, especially if special funding for it begins to dry up or if the person who championed the cause moves on to another priority too soon.

The issues that emerge during implementation and continuation, and strategies for dealing with them, are the basis for the next two sections of this essay. The interrelatedness of the three phases—of simultaneously acting and anticipating—becomes clearer as we continue the journey toward fundamental reform.

How Can We Make Implementation Work?

We closed the last essay with a brief discussion of what needs to occur once you have developed a plan for fundamental reform. Recognizing such a plan's size and complexity, we advocated a phased approach to implementation that starts with willing participants and easily accomplishable goals. The primary reason for doing so is to give both participants and interested observers early evidence that your reform plan is on the right course (Huberman & Miles, 1984; Crandall, et al., 1982).

If this advice sounds like a plain dose of common sense, you're right. In fact, you will need to use more common and planful sense now than you did during development of your reform plan. The process of implementation becomes more and more intricate as new people become involved; and as they use and test out new ideas, absolute change (as opposed to "on-paper" predictions) is at stake.

Bear in mind, too, the developmental growth in feelings that we all experience when we hear about and start doing something new. In the last essay we described seven Stages of Concern (SoC) that define the pattern of development—from self-concerns, to management concerns, to impact concerns. If, for example, the new program selected to start fundamental reform is your own, you've already addressed many of your own concerns for information and what it means for you personally (self-concerns), thought of ways that it could be staffed and paid for (management concerns), and your decision to move ahead means that you're satisfied that it's a worthwhile endeavor for students and teachers (impact concerns). In short, you are already a believer. Others are not, and they will need time, information, and attention to get to the same point you've reached.

Implementation, therefore, is more complex than initiation, and it will become increasingly so as more components of reform are introduced and modified along the way. Making this process more manageable is our immediate task, and we address the range of implementation issues through five interrelated themes: (1) leadership and vision, (2) evolutionary planning and development, (3) initiative taking and empowerment, (4) resource and assistance mobilization, and (5) problem-coping (Louis & Miles, in press).

1. Leadership & Vision

Louis and Miles' study of urban high schools led them to the conclusion that vision has two primary dimensions: "The first is a sharable and shared vision of what the school could look like; it provides direction and driving power for change, and criteria for steering and choosing....The second [dimension] is a shared vision of the change process ...[of] what will be the general game plan or strategy for getting there" (in press).

It is up to the educational leaders to set the tone for fundamental reform. Leaders who initiate reform must now be the catalysts for generating support and enthusiasm during implementation. This can be a delicate balancing act to perform. Bennis and Nanus (1985) call implementation of a new vision a dynamic interactive process, one that calls for leaders to perform "a kind of magic, to assemble—out of all the variety of images , signals, forecasts and alternatives—a clearly articulated vision of the future that is at once single, easily understood, clearly desirable, and energizing" (p. 101).

We believe that the real magic comes in the form of leaders who encourage widespread participation in both debates and decisions about the progress of reform. Anderson and Cox (1987) suggest that reform leaders help create and sustain vision through attention to the following:

- Be open to different views and perspectives
- Maintain a core of well-regarded and capable people to keep synthesizing and articulating the evolving view of the system
- Promote as much direct experience as possible with components of the change (i.e., keep the number of passive observers to a minimum)
- Broaden the number of people aware and committed to the change through communicating about it
- Build credibility through the use of public dialogue and symbols
- Legitimize emerging viewpoints that might support a new vision
- Closely monitor shifts in the change process that affect the organization
- Implement partial solutions when these might serve as building blocks for the larger change and overall reform effort
- Continue to broaden political support for reform, and
- Find ways to dampen the opposition

An example from one of the authors' (Horsley) experience working with a rural school district in Vermont illustrates this range of leadership functions. Roxbury, Vermont, is a K-6, 85-student district. The new Head Teacher and four classroom teachers all welcomed assistance in identifying and implementing a school improvement project, but they were unable to reach consensus after several meetings. As the technical assistance provider soon learned, the district had experienced too much change in recent years: The new Head Teacher was the fifth in five years, and the superintendency for the two-district supervisory union had changed hands six times in four years.

As the previous Head Teachers and Superintendents had come and gone, so too had their many ideas for school improvement. In a system already fraught with change, one or more classroom teachers had left the system each year. Those who remained when the fifth Head Teacher started had turned inward, concentrating their attention almost exclusively on their own classrooms and students. The net result was that school staff clearly recognized that significant changes needed to occur, but most teachers were reluctant to commit to yet another improvement effort that might disappear quickly. Compounding their reluctance was their perception of community attitudes toward the school and schooling. In a rural community of 560 or so residents, the school is the only public building in the village. Community members were believed to be highly critical of school staff and skeptical of any further changes that might be attempted.

After exploring these issues, the faculty and an outside consultant agreed that no lasting progress was likely to occur unless the community was involved in planning and decision making. Thus, Roxbury embarked on a strategic planning process that engaged faculty, the three-member school board, the parent-teacher association, and members of the community. During a series of community coffee hours held in private homes, one faculty and one board member at each informal session presented some basic demographic data and projections to community residents and then asked for their comments, suggestions, and concerns about education in Roxbury. A list of nearly two hundred items was generated, then distilled into about a half-dozen major categories. Priorities were identified from the condensed lists, and the faculty learned, among other things, that some of their own priorities for school change were represented on the list. Once faculty recognized that the community had a vested interest in certain kinds of

school change, they were able to move forward with a confidence that had been missing during the years of turmoil and turnover. Now into the third year of strategic planning and specific school improvements, there has been no further turnover in staff, and the Head Teacher's position has been upgraded to a half-time teaching position and half-time as Principal.

Success in Roxbury depended on the commitment and high visibility of the new Head Teacher who worked closely with both faculty and board members to create and sustain a vision of what schooling could be in their community. As we proceed through the next four themes, it becomes more and more apparent that leaders have the crucial role of weaving the tapestry of fundamental reform.

2. Evolutionary Planning and Development

If the sweeping list of leadership issues outlined above boggles the mind, take heart in the explicit message that closed the last essay: the planning effort that you engaged in during the initiation phase should leave you with the capacity to reflect, modify, and renew elements of your reform plan as necessary. Put another way, you have left some wiggle room for yourself and others. Research is conclusive that the most successful school improvement efforts occur in schools that allow for adaptation to changing needs and conditions—unexpected opportunities to take advantage of as well as pitfalls you might encounter.

Implementation also means that a lot of people are now practicing what reform planners have preached. The major implication for planning and development is to now blend the top-down initiative with bottom-up participation (Marsh & Bowman, 1988). As Fullan (in press) summarizes this theme, your charge is "to foster an atmosphere of calculated risk-taking and constant multifacted evolutionary development."

We have been watching this phenomenon unfold in a Maine project for the last two years. There, some twenty communities and their schools have been working to translate a loosely-defined state legislative initiative to raise the aspirations of young people through creation of partnerships between schools, businesses, and the community. Beginning with the state's concerns about low aspirations and its vision of how to raise them, communities have sought to translate statewide concerns and leadership into projects

that reflect local conditions. It is clear from interim evaluation reports that the only communities that appear to have established permanent and workable aspirations projects are those that have implemented major activities only after securing the advice and involvement of students and community volunteers, and only after deciding that while the ends they sought were not open to negotiation, the means for achieving the goals would remain open and subject to change as they learned more about what it means to raise aspirations.

Like fundamental educational reform, raising the aspirations of young people is an excursion into a vast and uncharted territory. It is a long-term venture, and there is neither the possibility nor the need to predict the single best way of traveling through it from the start.

3. Initiative-Taking and Empowerment

The initiative for fundamental reform can come from a variety of sources—from a school board, top administrators, or the teachers' union. But when implementation of reform is in progress, sharing of power and promoting initiative-taking by others is crucial. Everyone who has a stake in fundamental reform and its components needs to develop a sense of ownership and responsibility for their efforts. As Peters and Waterman (1982) summarize it, "Nothing is more enticing than the feeling of being needed, which is the magic that produces high expectations. What's more, if it's your peers that have those high expectations of you, then there's all the more incentive to perform well" (p. 240).

The challenge for reform leaders in this context is to find the balance points between relinquishing some power without losing control, supporting participants' initiatives without patronizing them, and taking their own leadership initiatives without shutting out others (Louis & Miles, in press). As we learned from examining Roxbury's previous history with change efforts, none of the previous Head Teachers and Superintendents felt secure enough to share their power and control, and a major reason for their short tenures and lack of lasting success can be attributed to their collective inability to solicit input from others and to give over some decision making authority to those responsible for implementing change.

At Fairdale High School in Fairdale, Kentucky, empowerment has acted as a rejuvenating force for both the teachers and the students. When Fairdale's principal, Marilyn Hohmann began restructuring efforts in 1986, over half of the students were classified as educationally disadvantaged. Hohmann instituted an innovative program based on shared decision making in all aspects of the school process. A specially formed 17-member steering committee comprised of teachers, support staff, parents, students, and administrators was formed to obtain input from the entire faculty and recommend changes to them. Each meeting of the steering committee is open to all faculty and staff who are encouraged to attend and participate. Shared decision making at Fairdale means just that: everyone attending is empowered with a vote.

Hohmann advocates keeping an open mind to new ideas. One successful program in the school, "U.S. Is Us," a two-hour interdisciplinary course in American studies, had its germination during a hallway discussion between teachers. Fairdale's restructuring efforts empowers teachers to make decisions that affect their individual classroom each day. Team teaching is currently being used in English, science, geography, math, and health classes. The teachers are given time to plan their class together, each contributing his or her ideas and strategies on an equal basis; and in class, each has equal input into student instruction and evaluation. Hohmann strongly believes that empowerment and leadership abilities are equal and integral parts of Fairdale's restructuring efforts. For two days every month substitute teachers are brought in so that teachers can attend outside leadership training classes.

Already a new attitude is coming over the school. Teacher Eileen Dalenberg sees "a new sense of ownership, commitment to programs developed by staff." "Students," she says, have benefited with higher achievement levels, improved attendance, fewer discipline problems, and a sense that teachers care."

4. Staff Development and Resource Assistance

It is abundantly clear that implementation is a complex social as well as technological process. Nowhere is this more evident than in the needs and demands of staff development. As Fullan describes it,

> Implementation, whether it is voluntary or imposed, is none other than a process of resocialization. The foundation of resocialization is interaction. Learning by doing, concrete role models, meetings with resource consultants and fellow implementers, practice of the behavior, the fits and starts of cumulative, ambivalent, gradual self-confidence all constitute a process of coming to see the meaning of change more clearly. Once this is said, examples of successful [staff development] approaches to implementation make sense (in press).

Research on implementation is unanimous in documenting the need for a staff development process that combines teacher-specific training activities, continuous support and technical assistance during implementation, and provision for regular meetings with peers and others. As we implied at the outset of this essay, one-shot training does not work: Skill-specific training by itself has no lasting value because it leads only to mechanical use of a new skill; it is only with time and mastery that the underlying ideas and concepts become assimilated.

The good news is that you have an extremely wide range of staff development and resource assistance expertise to draw upon, and most of it already exists within your school system and community. Further, this expertise can be used in a variety of formats chosen to fit the specific change and the people whose development is important. Continuing to Learn: A Guidebook for Teacher Development (Loucks-Horsley et al., 1987) cites twelve alternative approaches to teacher development:

1. Teacher as researcher
2. Implementing innovative practices
3. Clinical supervision
4. Peer coaching
5. Advising teachers
6. Mentoring beginning teachers
7. Teachers' centers
8. Teacher institutes
9. Networks
10. Partnerships
11. Training of trainers
12. Individually guided professional development

This is not an all-inclusive list. The authors of Continuing to Learn selected these twelve approaches for three reasons. First, they have been widely used and validated. Second, they are well-documented in the literature and,therefore, easily explored in more detail by a restructuring unit responsible for staff development. Third, they offer the potential of supporting achievement of school-wide goals, not just those of individual teachers, as do approaches like sabbaticals and conference attendance. Further, the variety offered by these approaches is consistent with what is known about the need to respond appropriately to the range of concerns and behaviors that we can expect to find in any group of educators with varying skills, experience, and interest.

Finally, viewing staff development from the perspective of fundamental reform requires a change in our traditional view of teachers. In their position in the educational universe—observing and working with children who are at the center of the universe—teachers need to be viewed as important sources of knowledge that inform what happens in schools, not just recipients of advice and information. We need to acknowledge that teachers' learning comes about through their daily practices with children and interactions with colleagues, as well as through staff development efforts; therefore, part of fundamental reform involves a conception of staff development as an ongoing, continuous, and integral part of the school's culture. In this view, teachers' time is legitimately spent in the improvement of practice (Shanker, 1990; Joyce & Murphy, 1990).

In the Richmond County, Georgia, schools, for example, about 30 of the district's 50 schools and nearly 1,000 teachers are regularly using research-based models of teaching that were new to them at the start of the project three years ago. As Joyce and Murphy (1990) observe, "We did not intend to get into the cultural change business. All we wanted to do was apply some of the results of research on training and teaching to help teachers engage in the study of teaching. But...if we don't deal with the program in terms of cultural change, the results of our efforts will have a very short half-life" (p. 245). The project has developed a cadre of teachers who now provide the training, organize teacher study groups, and reorient building administrators to new functions. The longer-term goal of the project is to enable any innovation in Richmond County to be initiated and implemented through a new conception of both staff development and teaching that advocates cross-cutting approaches to development activities and empowerment of teachers in the process.

Since the concept of fundamental reform is new to virtually everyone in your school system, the expanded definition of staff development needs to incorporate the ongoing professional development needs of every person and level in the school system. Administrators, central office support staff, custodial and kitchen workers, board members, parents, and others whose primary responsibility is outside of the classroom—all are part of the educational universe; if they are to serve the best interests of teachers and children, then staff development and other resource assistance must be made available to them as well.

5. Monitoring & Evaluation

Once again we stress the significance of tending to both the substance and the process of change. Effectively monitoring and evaluating your reform effort means that attention is paid to what people are doing (the substance of the effort), how they are doing it (their use of new skills and practices), and how they feel about what is happening (their concerns).

There are several key points about monitoring and evaluating your reform effort. First, your expectations and responses need to be consistent with the developmental nature of concerns and behaviors. Monitoring tools developed for Stages of Concern and Levels of Use, for example, can give you important information about evolving demands for leadership, clarity of your vision, who is taking initiatives, where and over what people are stumbling, how empowered people feel, and how to proceed with professional development activities.

Second, ongoing monitoring involves a set of activities that can provide you with the information needed to modify or stay your course. It is a direct link to the evolutionary development of your reform plan. In turn, how you establish and carry out these functions directly affects the process of change that people are experiencing. Setting out visible measurements and collecting preliminary data early on, involving as many participants as possible, and postponing evaluation of outcomes until people are comfortable using the practice, are strategies that support an overall sense of importance and ongoing improvement of your reform effort.

Information on reform efforts that are gathered through monitoring should be widely shared. Teachers and schools involved in the effort can easily feel isolated from each other, and your monitoring effort is one means of sharing good ideas. Monitoring information can also be used to support discussions about real or perceived problem areas and to report stories that illustrate how others in the system have responded to novel situations. It also provides one basis for giving recognition for jobs well done (Peters, 1987).

Make no mistake about your reform effort: If it is a serious one it is sure to have problems along the way. Developing an effective evaluation and monitoring process is one of the most difficult aspects you will encounter in your journey toward fundamental reform. And, mistakenly, it is usually the last component of a change effort that gets put into place. While we have placed it at the end of our discussion of implementation components, it most assuredly goes hand in hand with attention to the other four themes of implementation. Early and sustained attention to monitoring and evaluation are necessary to the informed choices you'll need to make about continuation of your reform effort—the subject of the next section.

How Can We Ensure that Reform Efforts Continue?

Continuation of Reform Efforts

It is not enough to implement reform, even to give it full support through the first two to three years of use, if attention is not also paid to the kinds of resources and support needed to make it a permanent fixture in your school system. The overarching issue in continuation and institutionalization is weaving a tight enough fabric under and around a change so that it is able to fend off threats to its existence, both internal and external. This can only be done by **all** parts of the system being strong and supportive—strong use by individuals, strong links between individuals, strong commitment by administrators and the community, strong structures to support continuation (such as funding, materials, and support staff), and strong staff development for new people and refresher courses for experienced users. Finally, we reiterate the importance of strong and stable leadership; not necessarily the same person from start to finish, but mechanisms to replace champions if needed, ideally through shared leadership from the outset of the reform effort.

The fact is that most school improvements, successful or not, are discontinued after two to three years. Obviously, no one wants to continue using a poorly conceived program or practice. But why stop using something that seems to be working well? There are two primary reasons, one related to decisions to initiate the change in the first place, and the other connected to shortsighted planning for implementation and continuation.

In the last essay we discussed the fact that the majority of school improvements are chosen for opportunistic reasons, either because special funding was available or because the project offered the prospect of career advancement for someone in the system. Neither of these reasons is necessarily bad—in tight fiscal situations, schools *do* need to look for outside resources to pay for anything out of the ordinary, and a good program that's well implemented *should* lend itself to career enhancement.

Unfortunately, opportunism in the form of pursuit of special funds too often means that the improvement effort was undertaken for reasons other than the good of children in the classroom. In other words, the decision to adopt a program is primarily a financial one and only secondarily, if at all, is the relevance or importance of the innovation considered. When special funds run out, such programs are abandoned due to lack of interest or inability to fund the "special project" with district funds.

Inability to fund special programs with district funds is directly related to the second reason for abandonment of school improvements. This results in a lack of money for staff development and support costs for both continuing and new teachers. The major studies of school improvement over the past fifteen years conclude that about half the staff development resources for an improvement project should be reserved for long-term implementation. Instead, most resort to the kinds of one-shot awareness and training that we discussed earlier in this essay.

In terms of continuation of worthwhile innovations, hardly any attention is paid to long term professional development and, especially, to staff turnover. Teachers do in fact retire, resign, transfer, or assume positions out of the classroom. Their replacements are too often left to fend for themselves or to try and learn how to use the innovation in extremely informal ways. Assuming the best—that the new teacher is smart, eager, and interested in the program—is

no guarantee of success, for a new teacher is confronted with a multitude of changes all at once, and without someone making the special project a priority, complete with training and support, there is no reason to expect that the innovation will have any importance for the newcomer.

So what to do now in the midst of your journey toward fundamental reform? In improvement efforts that last, the RAND study found that

> District officials paid early attention to mobilizing broad-based support for the innovation. And after federal funding ended, mobilization efforts were increased to pave the way for the project's transition from its special status to its incorporation into key areas of district operations: the budget, personnel assignment, curriculum support activities, and the instruction program. In short, the groundwork and planning for sustaining a change agent project had the early, active, and continued attention of school district managers (Berman & McLaughlin, 1978, p.20).

The good news is that fundamental reform does not fall into the category of shortsighted opportunism, and initiating such massive change forces the issue of seeking broad-based support from the beginning. Nonetheless, some components of your reform plan will likely start with "special project" status, as well they should, and one of your many responsibilities <u>now</u> is to begin planning for how and where to weave new threads of schooling into the durable tapestry of your district.

In addition to incorporating reforms into regular budgets, policies, and guidelines, Huberman and Miles (1984) also stress that continuation of reforms depends on whether or not a critical mass of administrator and teacher support has been generated, i.e., people who are skilled in and committed to the change, and establishing procedures for ensuring continued assistance, especially to support new teachers and administrators.

As we close this discussion of continuation cum institutionalization, there are two major points that underscore the view of fundamental reform as an ongoing process. First, for the separate components of reform, some few teachers and administrators will become so proficient in their practices that they will begin thinking of new and better programs that could be developed. For them, improvement does not end with a program finally being incorporated into budgets and policies and the like; instead, school improvement is a continuous process of renewal (Crandall, et al., 1982).

There needs to be a place for such people in the context of fundamental reform, thus our second major point: Fundamental reform efforts, in Michael Fullan's words,

> are in the business of institutionalizing the long term capacity for continuous improvement...one can succeed in the short run of establishing an exciting, innovative, effective school, only to find that it doesn't last. Deeper changes in the very culture of the school and its relationship to outside agencies are at stake if we are to develop this generic capacity for improvement (in press).

Such underlying purposes of fundamental reform bring us, not to the end of the linear process of initiation, implementation, and continuation, but full circle. The phases of change are as cyclical as they are interdependent.

What Special Factors Influence Fundamental Reform?

You will be confronted with a multitude of special factors and issues, some unique to your district, and some that apply to all. In this section we want to briefly identify some critical features of just three of these. The first applies to virtually all schools and districts: addressing the needs of at risk children. The second applies to an ever-increasing number of schools and communities: responding to the multicultural backgrounds of children in our schools. And third, we believe that the concerns of rural and small school districts engaged in fundamental reform deserve special note.

1. At-Risk Children

It is hard to argue with those who contend that the most compelling reason to restructure our schools is the growing number of children who are at risk and the critical results of their failure in present-day schools. As you explore the literature and experiences of others working with at-risk youth, you are likely to discover what seem to be contradictory views of how to respond to the issue: those who believe that what works for at-risk children are the same things that work for all children in restructured schools; and others who believe that there is no such thing as a generalizable child, and a generic approach cannot pay enough attention to the differences that children exhibit. As with many other issues involved in fundamental reform, we do not believe that the goal is a choice of "either/or," but rather to achieve a balance between the two perspectives.

NCREL's conception of schooling as it could be addresses the needs of all children—diverse instructional strategies that personalize learning and attend to learning styles; involving parents in the learning of their children and bringing in the resources of the community to enrich the curriculum; humanizing the organizational climate so that the success and engagement of every child is assured; and working with at-risk children in the regular classroom setting rather than in special "pullout" classes and locations.

These strategies can indeed support responses to the unique conditions presented by each child who is at risk. What's necessary, however, is to take deliberate next steps with at-risk children. Overall evaluations of student performance, family involvement, and organizational climate, for example, need to be examined more discretely and specific questions asked about how each of the strategies is working for at-risk children.

The K-8 City Magnet School, part of the Lowell, Massachusetts, Public School System, was created in the early 1980s as part of a system-wide plan to reduce minority isolation. Students come from all parts of the city and are admitted on a first come, first serve basis, with 40% of the population reserved for minority students. Lowell City Magnet models itself after George Richmond's concept of a micro-society school in which students design and run their own democratic, free-market society with teacher guidance. City Magnet School's students run their own government with legislative, executive, and judicial branches, and a school economy with its own currency. Students hold real jobs within the micro-society and use the money they earn to pay tuition for their classes. Students must take classes and pass competency exams in order to qualify for the jobs they want and, ultimately, in order to graduate. City Magnet's unique micro-society curriculum offers preparation for "real life" which is particularly important for at-risk students who commonly lack the opportunities and skills to succeed in the adult working world. Parents of City Magnet students, many of whom are working class, view this kind of preparation as one of the most beneficial aspects of the school's innovative curriculum.

2. Multicultural Education

Reconceptualizing your approach to multicultural issues fits neatly with a systems approach to fundamental reform, for the most compelling evidence calls for schools to develop a rationale for multicultural education that links student, communities, and schools. Instead of viewing "multicultural" simply on the basis of student make-up and culturally inclusive curriculum materials, holistic views of multicultural education take into account the vested interest that each of us has in critically analyzing and understanding the implications of living in an increasingly multicultural society and world. And to underscore the interrelationship of the components of fundamental reform, bear in mind that the children who are most at risk in our schools are not only poor, but also of minority descent and have limited English proficiency.

The typical response to pressures for creating multicultural equity in classrooms is simply to add multicultural information to subject matter and to expand English as Second Language offerings. But the former offers only added information, and the latter isolates ESL students—along with their concerns, conditions, and contributions—from their counterparts for whom English is a first language.

A growing number of multicultural observers, for example, advocate two-way bilingual education programs that blend second language immersion programs for majority, English-speaking children with bilingual programs for minority language children. One result is that majority language children are better able to appreciate the difficulty that ESL students have in mastering a second language. More important, however, is the simple fact that people of different ethnic groups are more likely to get along with each other if they understand each others' primary language and culture.

In terms of fundamental reform, we are talking about incorporating multicultural concerns into the core philosophy of the school system. In doing so, manifestations of the core philosophy will eventually find their way into social relationships within and without the school, and multicultural issues will come to be seen, rightfully, as both a product and a process.

3. Rural and Small Schools

By rural we mean schools and communities that are small, relatively isolated from cities and suburbs, and which perceive themselves to be different from their urban counterparts. Time and again, rural and non-rural educators have taken part in discussions that pit generalizable claims about school improvement against claims of unique conditions in rural education. A generalist will say something about the benefits of initiating a school change in a certain way, and a rural advocate will respond, "Yes, but...." As we have addressed work with at-risk kids and other reform issues, our intention here is to reframe the issue, to move from an "either/or" to a "both/and" perspective. There is truth in the claims for both generalizations and uniqueness, and we believe that rural and small schools can benefit from a synthesizing view of how generic principles apply to unique rural conditions.

There are some commonly acknowledged strengths and weaknesses associated with rural and small schools. Among the strengths cited are small class sizes, greater individual attention, low dropout rates, strong faculty identity and commitment to the school, and strong parental and community interest in the school. Among the weaknesses are lack of breadth and depth in the instructional program, lower student performance, inadequate professional development, and inadequate financial resources. Other issues—some positive, some not—also are apparent: administration is more personal and flexible (or inflexible!); the school is often the only visible social institution in the community; and curriculum and instruction are more student centered, collaborative, and adaptable.

The problem with lists like these is that they immediately set up dichotomies. Items that ring true for some rural educators set off alarm bells for others: Yes, there is indeed strong parental and community interest in small and rural schools, but "interest" doesn't necessarily mean "support"; increasingly, multiple and strongly-held points of view are apparent in rural and small communities. And yes, classes do tend to be smaller, but to what advantage if instructional and curriculum needs can't be accommodated in this year's budget?

The fact is that the stereotypical small town is hard to find nowadays. As the number of family farms diminishes, as urban and suburban sprawl encroaches on open land and outlying communities, as new industries seek space and lower tax bases, and as small communities get "discovered" by people in search of a "simpler" way of life, changes inevitably occur. In subtle and not-so-subtle ways, community norms and values begin to change.

On the surface, Roxbury, Vermont, presents a rather homogeneous image—predominantly Anglo-American with a few French Canadians mixed in, lower middle class incomes, and similar educational attainments. But a closer examination of the three-member school board reveals a more complex picture: one is a native Vermonter whose family has been in the valley for ten generations; one is a building contractor whose primary income is from condominium construction at a ski resort across the mountain; and one is a homemaker who moved from New York to Roxbury in the late 60s. As the board members got more involved in reform, we learned that, contrary to popular belief, it was not the native Vermonter who resisted change ("Talk to me," she said, "I'll listen to good ideas."). Rather, it was the 60s-transplant board member who fought hardest against change; she represented a constituency that had come to Vermont in search of an idyllic way of life, and among their images was that of a one-room schoolhouse. And the building contractor represented a growing number of young professionals in the community who commute to jobs in the capital, Montpelier, twenty-five miles away; their rallying cry was accountability and attention to the basics of education. Not unlike incorporation of multicultural concerns in reform, the board members came to appreciate the richness of their own diversity.

There are strong parallels between rural and urban schools, especially in terms of the dynamics of change (not necessarily the substance). And in those parallels we see an opportunity for urban and suburban districts to learn from the experiences of rural schools and communities; the process of change is the same in both, and what rural and small schools offer is a size and scale that is somewhat easier to analyze. In short, there are fewer moving parts to observe in rural schools, and larger districts involved in fundamental reform would be well advised to compare notes with rural counterparts who are also working on fundamental reform.

Walters Elementary in rural southwestern Oklahoma is an inspiring example of what can be accomplished when a small staff undertakes a cooperative reform effort. In the fall of 1988, Walters Elementary introduced its Integrated Learning Approach, a hands-on integrated teaching/learning process based on the belief that all subjects are interrelated and that students learn most effectively through doing and relating. The Integrated Learning Approach is a composite of previously developed teaching techniques which

were brought to the attention of the Walters Elementary superintendent by two of the school's teachers. Backed by the superintendent, the new program won the support of most of the school's approximately 20-member faculty. Ninety percent of the faculty are currently participating in planning sessions and attending classes and workshops. Faculty members have shown a willingness to invest extra time and, in some cases, money out of their own pockets to visit other schools and bring in outside consultants. While the school is still undergoing the transitional process of implementation, positive results are already apparent: teachers are sharing information and encouraging each other rather than competing; students are demonstrating higher order thinking skills; discipline problems have decreased; and parents are beginning to share the enthusiasm which has become pervasive among teachers and students in the school.

What Are the Critical Issues in Fundamental Reform?

Throughout this essay and the last one we have drawn on knowledge of the change process to describe key dimensions you will encounter as you proceed with fundamental reform. As we come to the end of our part of the journey with you, we want to leave you with a summary of the critical ingredients that are a part of fundamental reform, from beginning to ongoing cycles of reform.

In all of the phases and events we've talked about, six key ingredients emerge as overarching: people, processes, practices, policies, power, and philosophies. Referring to six "P's" sounds contrived, but we believe that they capture the scope and scale of fundamental reform in an effective way.

1. People

You will be dealing with a wide range of people in an equally wide range of ways. Their needs, motivations, behaviors, and the roles they play are all factors. They will bring to their tasks skills, experience, and feelings—all are legitimate factors to consider and respond to, and all combine to make up the subjective and objective meanings of change.

As important as anything else, people at all levels of the system will have unique roles to play in fundamental reform. The point we want to underscore here (in addition to everything else we've said about how people change) is that you should be prepared for people to change their roles as reform proceeds. What this means is that there should be a minimum number of "heroes" in fundamental reform, that your progress should not be dependent on a select few advocates without whom reform might falter. Instead, there can be large numbers of "heroes"—an innovator who comes up with a brilliant idea isn't necessarily the best person to manage implementation, nor is a good implementor the obvious person to carry out continuation strategies. For many components of reform you will probably want to have a team manage the change, relying on a variety of strengths and talents, and building in strategies for staff turnover.

2. Processes

We have talked at some length about how change progresses over time and what can be done along the way to ensure success. What needs to be done at the beginning is different from what needs to be done later; what people find helpful at one stage they will not find helpful at another. To complicate matters, what will happen during the course of fundamental reform is that you will find yourself in the midst of multiple change processes. Your major task in this regard is to "unbundle" all of the discrete changes that are taking place—problems in one component can dramatically affect progress in another if care is not taken to separate the issues and the reactions people have to them. At the same time, success in one or two areas can lead to avoidance of problems in others. Your priorities will need to be carefully established and monitored, and clear lines of communication maintained.

3. Practices

Students, teachers, and school improvements succeed when new programs and practices are well-defined, effective, and "classroom friendly." In the context of restructuring, however, this is a much more complex issue. New practices will include some that are covered in the traditional school improvement literature (e.g., cooperative learning), as well as others that you will be creating or modifying. The pitfalls to be aware of include new practices that are ill-defined, unproven, or unfriendly (e.g., shared leadership). "Well-defined" in restructuring terms may simply mean being careful to know what you are doing, especially to understand the key components of "borrowed" practices.

By effective, we mean programs and practices that have been tried and found to produce appropriate results with enough teachers and students to be believable. A formal quantitative evaluation is not necessary, but an opinion or testimonial from a single teacher is not enough. Unfortunately, there is scant evidence on the effectiveness of restructuring efforts—little has been tried, and you will need to approach new practices carefully. Instead of wholesale adoption of proven practices, we believe that your best course is to pilot new practices, to treat them as developmental and changeable, based on monitoring and evaluation results.

By "classroom friendly" we mean avoidance of practices that are research or theory-bound and which have not yet been translated into practice. To be classroom friendly means that a practice is designed in such a way that most teachers can begin using it immediately in their classrooms (bearing in mind, of course, the developmental support needs that teachers will have as their use progresses).

4. Policies

By policies we refer to the pressure or push from policymakers and administrators that takes the form of mandates, guidelines, regulations, expectations, and direction. It is perfectly legitimate, indeed sometimes necessary, to mandate change. Sometimes a nudge is what people need to begin thinking about alternative ways of doing and being—for some, strong leadership provides a sanction for doing what they always wanted to do; for others, mandates are a way of helping them suspend disbelief long enough to give something new a try. For overall reform there need to be macro-policies that encourage and support a wide range of reforms—a policy, for example, that provides a mechanism for temporarily suspending more discrete policies and guidelines that might be barriers to reform. Put another way, policies need to be formulated that provide participants with clear sanctions to proceed with reform.

5. Power

Reform necessarily engenders power struggles, and that can be all that matters for some people. For them, use of power consists of how to recognize, resolve, negotiate, navigate, and so on. In this sense, power is closely equated to politics. At the same time, power also refers more concretely to how policymakers and administrators use their authority to lead, to direct, to delegate, and to manage.

Real power, we believe, is shared widely, thus the exercise of it in restructuring efforts ought to include the empowerment of many. The very nature of fundamental reform—the scale and scope of long-term change—calls for nothing less than shared leadership and decision making. Unlike the discrete school improvement efforts of the past, fundamental reform requires sharing power with a wider range of participants than ever before—students, teachers, parents, school board and staff, and members of the community. All of these groups are constituents, all have vested interests in what happens in the exercise of power.

6. Philosophies

This is the "why" of fundamental reform, the articulation of your district's shared vision about schools and schooling that serve all children and all adults. Philosophies are invoked in the formulation of a mission statement. In turn, your mission or statement of shared vision creates the context for how power is exercised, what kinds of policies and practices are adopted, what processes are followed, and how people in, or affected by, the system are treated.

Conclusion

As we have seen, fundamental reform is a cyclical process that involves a number of interrelated tasks and processes. Like NCREL's conception of learning-centered schools, the three primary phases of change—initiation, implementation, and continuation—are interconnected. While reform is a massive undertaking, we believe that it is, by far, a clearer way of achieving change than frequent and disjointed attempts at school improvement. We have not given you any "maps" for the many roads to fundamental reform; rather, as we said at the beginning of ***Guidebook 6***, our intent has been to provide you with a guidebook about the terrrain you will be covering, to point out what the key features and landmarks look like and what the general climate is likely to be.

It is your turn, now, to draw the precise maps, to designate and construct new linkages between the different parts of your educational universe, and to decide how and when you'll visit destinations along the way to fundamental reform. We wish you well on your journey.

ESSAY ACTIVITIES

How Can We Make Implementation Work?

How Can We Ensure That Reform Efforts Continue?

What Special Factors Influence Fundamental Reform?

How Can We Make Implementation Work?

Activity 1: How can you address factors that influence implementation?

DESCRIBE an ongoing, planned, or anticipated restructuring effort in your school or district. With a group of teachers, administrators, other school staff, students, parents, and community members, DISCUSS and ANSWER the following questions to ensure that your restructuring efforts are implemented.

1. What is your vision for your school or district? Write your vision as a set of goals to be attained as a result of restructuring and as a mission statement.

2. What is your vision of the strategies and processes you will use to attain your goals?

3. What leadership characteristics are particularly important in your school or district that will ensure that your restructuring efforts are implemented?

4. What are some ways you can promote increasing ownership of and responsibility for your restructuring efforts among school staff, students, parents, and community members?

5. What are some staff development ideas that can ensure implementation of your restructuring efforts? (Video Conference 8 addresses staff development in detail.)

Activity 2: How can you monitor and evaluate the implementation phase of restructuring?

Groups of teachers, administrators, other school staff, students, parents, and community members should do this activity together and then share their ideas with the larger group. Use the ideas in the *Guidebook* and video series, ideas from your own experience, and new ideas to ANSWER the following questions about monitoring and evaluating in the implementation phase of restructuring. BRAINSTORM ideas first, then SELECT those that seem the most promising.

As you do this activity, keep in mind that monitoring and evaluation should address what people are doing, how they are doing it, and how they feel about what they are doing.

1. How can your monitoring activities address how people feel about new strategies and directions?

2. What can you do to assure that you keep to your plan and, at the same time, can modify it and take new directions?

3. What are some ways that your monitoring activities can be a learning and rewarding experience for all participants in your restructuring efforts?

4. What procedures will you use to measure and evaluate your progress?

5. When will you begin your monitoring activities? Plan a tentative schedule for these activities.

How Can We Ensure that Reform Efforts Continue?

Activity: What can your school or district do to ensure successful restructuring?

Groups of teachers, administrators, other school staff, students parents, and community members should do this activity together and then share their ideas with the larger group. The Guidebook states that change needs to gain strength in order to be lasting. In this activity, IDENTIFY things your school or district can do to provide increasingly strong support for restructuring. SHARE your ideas with other groups.

Ways your school or district can identify and avoid common failures
(Examples: reform not initiated for good reasons, poor planning for the implementation and continuation phases)

Ways your school or district can draw on others' successful change experiences
(Examples: broad-based support; support in key areas such as budget, staff, curriculum; critical mass)

Ways your school or district can encourage ongoing renewal at the individual level

Ways your school or district can encourage ongoing renewal at the institutional level

What Special Factors Influence Fundamental Reform?

Activity 1: How does your school or district's restructuring efforts address the needs of at risk children?

Groups of teachers, administrators, other school staff, students, parents, and community members should do this activity together and then share their ideas with the larger group. First, DESCRIBE your school population and your community. Then, DETERMINE what factors exist in this population and in your community that might put students at risk for success in school. Finally, BRAINSTORM ways to address these potential problems in your restructuring efforts. You may want to refer to the first five video conferences and ***guidebooks*** for ideas.

Your school population and community:

The students at risk in your school:

Factors that might put students at risk:

Outside of school

Inside of school

Ways your restructuring efforts can address these potential problems:

Outside the school

Inside the school

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Activity 2: How do your school or district restructuring efforts incorporate multicultural education?

Groups of teachers, administrators, other school staff, students, parents, and community members should do this activity together and then share their ideas with the larger group. STATE student outcomes regarding their ethnic group and other groups. IDENTIFY how your school is addressing these outcomes. IDENTIFY and DISCUSS strategies to address multicultural concerns.

1. What feelings, beliefs, and knowledge do you want your students to have about

   their own ethnic group?

   other ethnic groups?

2. In what ways is your school or district working to address these goals/outcomes?

3. Identify and discuss three strategies to address multicultural concerns in your school.

Activity 3: How can you use your school's or district's and community's strengths to support restructuring?

Groups of teachers, administrators, other school staff, students, parents, and community members should do this activity together and then share their ideas with the larger group. The guidebook points out characteristics of rural and small schools that can treated as strengths or weaknesses for restructuring. Urban communities also have potential strengths and weaknesses. First, LIST the characteristics of your community that you consider strengths and weaknesses. Then, DISCUSS ways to draw on your strengths and to turn your weaknesses into strengths, or at least to minimize their effects.

Strengths	**Ways to take advantage of your strengths**

Weaknesses	**Ways to turn your weaknesses into strengths or to minimize their potential limitation in restructuring**

SCHOOL-BASED ACTIVITIES

Activity 2: Getting Started (Continued from ***Guidebook 6***)

Activity 3: Continuing to Grow

Note: The activities in this section are sequenced to address different levels of involvement in the restructuring process. Begin by selecting the activities best suited to your school.

Activity 2: Getting Started (continued from Guidebook 6)

PART A: How can your leadership team promote set a tone that encourages fundamental reform?

In Activity 2: Getting Started, PART B: "Who should be on your restructuring team?" in ***Guidebook 6***, you formed a restructuring team. Although this team forms the core leadership for your restructuring efforts, it cannot succeed without the support of all staff, students, parents, and the community.

REVIEW your goals in Activity 2: Getting Started, PART C: "Who will be responsible for helping you achieve specific objectives?," No. 5, in ***Guidebook 6*** for involving staff, student, parent, and community. Expand these goals beyond simply informing and educating people about restructuring. LIST activities that will encourage genuine participation in the change process. To do this, you may want to REVIEW the Leadership and Vision (pp. 11-14) section of the essay and essay activities in this ***Guidebook***.

Expanded goals	Activities

PART B: What objectives and activities in your restructuring plan will address special factors in your school or district?

1. REVIEW the internal scanning you did in ***Guidebook 6*** and your brainstorm ideas about at-risk children, multicultural education, and rural and small schools in the "Special Factors" essay activity in this guidebook. DISCUSS whether you need to add other special factors besides the three discussed in this ***Guidebook***. LIST all special factors that you must address in your restructuring plan in column 1.

2. REVIEW and EVALUATE your school's needed changes and your specific objectives and the plan you developed in ***Guidebook 6***, Activity 2: Getting Started, PART A: "How can your school move toward an ideal learning-centered system?" and PART C: "Who will be responsible for helping you achieve specific objectives?" MODIFY or ADD appropriate objectives in the second column to address factors you listed in the first column.

3. DESCRIBE how you will address these factors in column 3.

Special factors	Objectives	Activities
at risk children		
multicultural education		
rural/small school		
other factors:		

Activity 3: Continuing to Grow

PART A: How will your restructuring plan assure that your restructuring efforts will be sustained over time?

Reform are too often given full support only through the early stages of the change process. If your restructuring efforts are to become a part of your school or district's foundation and culture rather than a passing fad, long range planning is necessary.

DEVELOP a plan for long term support, evaluation, and modification of your restructuring plan. USE your ideas in the "How can we ensure that reform efforts continue" essay activities in this guidebook. For each element, LIST what the ongoing need is, when and how often it should be addressed, and who should be involved.

What	When	Who
public information needs		
staff development needs		
ongoing evaluation		

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effective ways to
use evaluation data

realistic schedules/
timelines for long-
term efforts

ways to incorporate
new educational
strategies into your
restructured school
or district

other:

PART B: What are the barriers to sustaining restructuring efforts?

Although there may be strong initial interest in the change process, there are often barriers to its long term survival, e.g., loss of enthusiasm, lack of consensus, and lack of support. IDENTIFY barriers to sustaining your restructuring efforts.

PLAN ways to sustain and revitalize your restructuring process over time (many years). USE ideas you developed in the "What can your school or district do to ensure successful restructuring?" activity in this guidebook.

ADDITIONAL INFORMATION

Program Descriptions

1. The New Definition of Learning: The First Step for School Reform - The point of departure in thinking about restructuring is to consider a new definition of learning based on recent research in cognitive sciences, philosophy, and multicultural education. Positive attitudes toward learning, toward oneself, and toward others; a strategic approach to learning; and self-regulated learning are key goals emerging from this research. While these perspectives build on earlier approaches to active learning, they are "new" in contrast to traditional models of schooling. Also, it is especially important in our changing and changed society to promote meaningful learning among all students. The vision of meaningful learning developed for a restructured school will determine the curriculum objectives, classroom instruction, assessment, and the social organization of the school.

2. The Thinking Curriculum - If students are to engage in meaningful learning, numerous curricular issues must be addressed. A dual agenda must be implemented focusing both on enriched content and expanded notions of higher order thinking. Otherwise, students will learn isolated skills and facts as ends in themselves. If schools are to become communities of scholars, collaborative learning and the interpersonal skills needed to support it must become part of the curriculum. Activities to develop self-regulated learning and motivation must become part of the curriculum for students of all ages and abilities, but especially for students at risk and younger students. Finally, higher-order thinking and reasoning must pervade the curriculum from K-12.

3. The Collaborative Classroom: Reconnecting Teachers and Learners - If there are profound changes implied from the new definition of learning for what students learn, there are equally serious consequences for the roles of teachers in the classroom. Teachers will need to facilitate, mediate, model, guide, assist, share, listen, and adjust the amount of support provided. Moreover, many teachers will need to develop strategies for teaching diverse students within heterogeneous classrooms.

4. Multidimensional Assessment: Strategies for Schools - If the curriculum is to change, the current debate over the usefulness, or uselessness, of standardized tests is likely to be intensified. It makes little sense to redesign curricula to teach for understanding and reflection when the main assessment instruments in schools measure only the assimilation of isolated facts and effective performance of rote skills. Alternative assessment methods must be developed to evaluate and increase the capacity of learners to engage in higher order thinking, to be aware of the learning strategies they use, and to employ multiple intelligences. Alternative modes of assessment are valuable both to students in promoting their development and to teachers in increasing the effectiveness of their instruction.

5. Schools as Learning Communities - In schools that are learning communities, students' learning and teachers' instruction use the community and its resources. In addition, the schools promote learning as a lifelong activity for all citizens. As a result, community members increasingly spend more time in schools to learn, provide support services such as tutoring and teaching, and participate in school life. More and more, schools of the future will be places where administrators and teachers learn and work collaboratively. Schools as learning communities may also mean working with local businesses and agencies to provide increased support services to help students and their families become better learners.

6. Many Roads to Fundamental Reform in Schools: Getting Started - Teachers and administrators who form learning communities reflect as a group on schooling and learning—they probe their assumptions about learning, they debate what they see as essential in the educational experience, and they build consensus on what vision of learning will undergird their school's mission. Initiating a broad-based dialogue comparing learning that should occur to learning that is actually occurring is a first step in getting started. A broad-based dialogue includes community members, parents, teachers, administrators, and students. In furthering the dialogue, participants should pursue the implications of their new definition of learning for all dimensions of schooling—curriculum, instruction, assessment, school organization, and community relations.

7. Many Roads to Fundamental Reform in Schools: Continuing to Grow - If all participants in this school community are successful learners, then they know that the process of learning is ongoing and iterative. They know that schooling and learning are driving concepts that must be repeatedly developed in their meaning. Participants are continually learning and re-learning what the mission of the school is, what the vision of learning should be, how to realize this vision, and the many subtle ways the vision is impeded by organizational and attitudinal constraints. Formative evaluation of the restructuring process becomes "business as usual" for the school.

8. The Meaning of Staff Development in the 21st Century - Traditional roles of staff development for teachers and principals focusing on one-shot events are as outdated as traditional models of learning. Therefore, a major task of the restructuring movement is to align models of staff development with new visions of learning to allow teachers and administrators to plan together sustained, high-quality staff development programs. Video Conference 8 focuses on developing new roles for teachers and administrators based on research on expert teaching and staff development.

9. Reconnecting Students at Risk to the Learning Process - New visions of learning suggest that students who are academically at risk have been largely disconnected from the process of learning by segregation into poorly coordinated and impoverished remedial programs emphasizing drill on isolated skills. Research indicates that such students can be reconnected to the learning process by training regular classroom teachers to use teaching/learning strategies which are successful for students in heterogeneous classrooms and by providing them with dynamic assessments and highly enriched learning environments. Video Conference 9 highlights successful programs.

Computer Forums

Much of the value and excitement of participating in this video series arises from the opportunity to interact with presenters and share in the national dialogue on restructuring. Indeed, this dialogue is a primary goal of this professional development series. Yet, there is only so much time available to engage in such dialogue during each video conference. To participate in the continuing dialogue after each video conference, viewers can access LEARNING LINK, a computer conferencing system.

This system was developed for public television to increase the impact of distance learning. Using this system, members can:

- **Ask presenters questions** for one month after each video conference
- Talk to each other to **share experiences**, help solve problems, learn about resources, and ask for assistance
- Participate in "**discussion groups**" organized around specific topics such as the thinking curriculum
- **Access calendars** for events related to restructuring and teaching for thinking and understanding
- **Access new information** pertinent to the video series such as news items, alerts, and announcements of new publications
- **Search** user's communications for information and commentary on specific topics such as assessment
- **Survey** what others think about a given issue
- **Access large documents** that NCREL enters into the system (for example, articles and annotated bibliographies)
- **Exchange strategic plans** with others

Who Will Be Available to Address Questions and Comments?

NCREL and PBS have asked the presenters if they, or their staff, can be available for approximately one month after each video conference to answer additional questions. While we do not expect that all of the presenters will be available, we anticipate that there will be some from each conference in the series. A full-time conference moderator will be available from Indiana University at Bloomington. This person will be able to answer questions pertaining to all aspects of restructuring as well as to respond to technical questions and facilitate conference dialogue.

What Do I Need To Use LEARNING LINK?

All you need to apply is a microcomputer (any brand), a modem, and telecommunications software such as Apple Access 2, Apple Works, Procomm, or Red Ryder.

How Much Does LEARNING LINK Cost?

Regular account membership is $189.00 for 20 hours of access to the system. However, **DataAmerica** and **IBM** have partially underwritten the cost. The first 2,500 people to register will pay only $95.00 for 15 hours. Of these special $95.00 memberships 1,500 will be reserved for persons in the NCREL region. Memberships will be processed on a first-come, first-served basis. For information,

phone:	or write:
Erica Marks	IntroLink
IntroLink	Learning Link National Consortium
(212) 560-6868	356 W. 58th St.
9:30-5:30 EST	New York, NY 10019

Note 1: While there may be nominal local connect charges, there will be no additional fees for long distance usage for hours of service purchased. This is true whether you pay $189.00 for 20 hours or $95.00 for 15 hours.

Note 2: Members currently using LEARNING LINK service do not need to apply. They are already eligible to participate in the service for this video series through their local LEARNING LINK system. For information, watch for announcements in your bulletin boards.

Remember: You must already have a microcomputer, a modem, and telecommunications software in order to access LEARNING LINK.

Materials

Video Conference **Guidebooks** include pre- and post-conference activities as well as other activities for various workshops. Activities are customized for different levels of knowledge. Some activities are introductory; others are more advanced. Each downlink site will receive one camera-ready master copy free of charge for local reproduction as part of the licensing arrangement.

Selected Readings include reprints of various articles and other information for each video conference. We have created a flyer, including an order form, for you to distribute. This form can be found at the end of this book. Two volumes of **Selected Readings** will be available for $15.00 each (plus shipping) from:

Zaner-Bloser, Inc.	(800) 421-3018
Customer Service	8:00 am - 4:30 pm EST
1459 King Avenue	Fax: (614) 486-5305
P.O. Box 16764	
Columbus, OH 43216-6764	

Course Credit Information

In the NCREL region (Illinois, Indiana, Iowa, Michigan, Minnesota, Ohio, and Wisconsin), the National College of Education will offer two graduate hours of credit to:

- Groups of students using an approved on-site facilitator
- Individuals employing instructional services by telephone

For more information about credit in the NCREL region, please call Sonja Clary, Associate Dean for Off-Campus Programs, (708) 475-1100, ext. 2335.

In the fall of 1990, PBS Adult Learning Service will offer Restructuring to Promote Learning in America's Schools as a telecourse. For information, please call (800) 257-2578.

Local Involvement

Inside the NCREL Region

NCREL has identified local teams from each of its seven states to assist in implementing the video series. Teams include people in these areas: media, staff development, curriculum and instruction, and rural and urban education. Each team has developed its own implementation plan. Local PBS stations throughout the region will also be a part of the local outreach.

Outside the NCREL Region

You may want to generate activities similar to those in the NCREL region. Some suggestions:

- Your school or agency can provide immediate commentary and analysis at the local site after each video conference.
- Local colleges or universities may use the series as part of course requirements.
- State education agencies and/or other qualified agencies may provide continuing education credits, or equivalent, for participation in the series.
- Local and state education agencies may provide Leadership/Management Academy Workshops, study groups, and/or other workshops using the video series.
- Your school may provide school credits/career advancement for participation.

REFERENCES AND RESOURCES

Bibliography

Organizational Resources

Presenters' Biographical Information

Regional Resources

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Erratum for ***Guidebook 6***: The following reference should have been included in the Bibliography:

Hall, G. F., Loucks, S. F., Rutherford, W. L., & Newlove, B. W. (1975). Levels of use of the innovation: A framework for analyzing innovation adoption. Journal of Teacher Education, 26(1).

Organizational Resources

Throughout the past few years, NCREL has been in contact with a number of organizations that focus on restructuring. Each organization would be happy to provide information on its services.

Accelerated Schools Action Project (ASAP)
North Central Regional Educational Laboratory
295 Emroy Avenue
Elmhurst, IL 60126
Beverly J. Walker: (708) 941-7677

American Association of School Administrators
1801 North Moore
Arlington, VA 22209
Lewis Rhodes: (703) 528-0700

American Federation of Teachers
Center for Restructuring
555 New Jersey Avenue, NW
Washington, DC 20001
Bruce Goldberg/Marsha Levine:
(202) 879-4559 or 4461

Center for Educational Renewal
College of Education DQ12
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Coalition of Essential Schools
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Brown University
Providence, RI 02192
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Indiana University
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Mastery In Learning Project
National Education Association
1201 16th Street, NW
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National Urban Alliance
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Erratum: Please note that in ***Guidebook* 6**, the area code for the Center for Educational Renewal is incorrect. The correct number is (206) 543-6162.

Presenters' Biographical Information

Robert Calfee

Robert Calfee is an experimental cognitive psychologist with research interests in the affect of schooling on the intellectual potential of individuals and groups. He earned his degrees at UCLA, did post-graduate work at Stanford, and studied Psychology for five years at the University of Wisconsin, Madison. In 1969 he returned to Stanford University where he is presently a professor in the Committee on Psychological Studies in the School of Education. His interests have evolved over the past two decades from a focus on assessment of beginning literacy skills to a concern with the broader reach of the school as a literate environment. His theoretical efforts are directed toward the nature of human thought processes, and the influence of language and literacy in the development of problem-solving and communication. His research activities include Project READ, The Inquiring School, and Literacy for the Year 2000. These projects all combine theoretical and practical facets directed toward understanding and facilitating school change. He has also written critical papers in recent years on the effects of testing and educational indicators, on ability grouping, and on textbooks.

Eric J. Cooper

Eric J. Cooper is the Vice President for Inservice Training & Telecommunications, Simon & Schuster Education Group. He has been an administrative assistant in the Office of Curriculum, Boston Public Schools, a director of a treatment center for emotionally disturbed students, a teacher, researcher, counselor, and Washington Fellow. He is a national consultant working with school systems and state departments of education on issues of staff development, cognitive instruction, and management of the change process. Publications include: *Reading, Thinking & Concept Development, Educating Black Children: America's Challenge, Toward a New Mainstream of Instruction for American Schools*, and *Managing the Change Process for Teaching Thinking*. Dr. Cooper's educational mission is to support the improvement of education for urban and minority students. In line with this mission, he is working on a restructuring project with Ted Sizer and the Education Commission of the States, and is directing the National Urban Alliance for Effective Education (a network of school systems, educational agencies, businesses, and national television stations committed to reforms in testing, staff development, and instruction).

John I. Goodlad

John I. Goodlad is Professor of Education and Director of the Center for Educational Renewal, University of Washington. Born in Canada, he has taught at all levels, from kindergarten through graduate school, and served from 1967 to 1983 as Dean of the Graduate School of Education, University of California, Los Angeles. He holds B.A. and M.A. degrees from the University of British Columbia, a Ph.D. from the University of Chicago, and honorary degrees from nine universities in Canada and the United States. Goodlad's research interests are in educational change and improvement and have been reported in more than twenty books and in hundreds of other publications. An extensive study of schooling resulted in *A Place Called School* (1984). A subsequent, comprehensive study of the education of educators is in press for publication later in 1990.

Thomas F. Malone

Thomas F. Malone has been Program Facilitator at the McDonough City Magnet School in Lowell, Massachusetts, since 1985. Mr. Malone has worked closely with the principal and staff in overseeing the development, implementation, and expansion of the innovative micro-society curriculum featured at this K-8 school. Mr. Malone has served as a consultant on the micro-society curriculum to the Yonkers (New York) Public Schools. He has also served as a consultant to the PBS program "Why These Kids Love School." In addition, he has hosted visiting educators from throughout the country at the City Magnet School. As one of the original founding teachers of the City Magnet School in 1981, Mr. Malone worked with students in writing the school's constitution and laws, the foundation of the micro-society's citizenship/government strand. Teaching in an urban setting since 1971, Mr. Malone has been a proponent of experiential education. Mr. Malone is presenting pursuing a C.A.G.S. in Administration, Planning and Policy at the University of Lowell, where he received his B.A. and M.Ed.

Janice A. Perry

Janice A. Perry has been a teacher in Seattle Public Schools for 18 years. She has taught classroom levels from kindergarten through fifth grade and been a specialist in music, math remediation, math enrichment, and science. Ms. Perry has been a leader in the Mastery in Learning Project at Kimball School since its inception in 1986. She has served on the Steering Committee, chaired the Communication Committee, and became Coordinator of the MILP-IBM Computer Network in 1988. She represents teachers on Public Education Advisory Boards for two universities and is an

Advisory Board member of the Teacher Leadership Team Strand of the Puget Sound Educational Consortium, affiliated with the University of Washington. Last fall she interned as a staff member of the Seattle Education Association, the local NEA union. Ms. Perry holds a Master's Degree in Education Administration from Western Washington University.

Tom M. Rowley

Tom M. Rowley presently serves as Elementary Principal for Walters Public Schools. Walters is a small Oklahoma town which serves a rural area. Mr. Rowley taught in various elementary grade levels for 17 years prior to accepting his present position in 1986. In his earlier years in education he was involved in implementing a series of math and physical education programs. He received his Masters Degree in Education from Northwestern Oklahoma State University in 1988. His present involvement in a local approach to integrating curriculum (WEILA: Walters Elementary Integrated Learning Approach) has earned the Elementary School recognition by the Oklahoma State Department of Education in a special project called "Lighthouse" and a rural staff development project by the Southwest Educational Development Laboratory.

Theodore R. Sizer

Theodore R. Sizer has been Professor of Education at Brown University since 1983 and has chaired the Coalition of Essential Schools since 1984. Formerly, he was Dean of the Harvard University Graduate School of Education from 1964 to 1972 and headmaster of Phillips Academy in Andover, MA, from 1972 to 1981. He is the author of a number of books, including *Horace's Compromise: The Dilemma of the American High School*(1984) and *Places for Learning, Places for Joy: Speculations on American School Reform*(1972). The Coalition of Essential Schools, chaired by Sizer, is a nationwide secondary school reform movement based on a set of common principles including: students should learn to use their minds well; they should master a limited number of essential skills and areas of knowledge; teachers and learning should be personalized; a diploma should be awarded upon a successful final demonstration of mastery (exhibition); school should stress values of unanxious expectation, trust and decency; and teachers should have no more than eighty pupils in a total student load.

William C. Towner

William C. Towner has worked in public education for close to three decades. During his career, he has worked as a school psychologist, classroom teacher, reading specialist, teacher of gifted, educational consultant. Currently he is a library media specialist at Kimball Elementary School in Seattle. In addition to public school work, Towner also serves as adjunct faculty at Seattle University, Seattle Pacific University, and the University of Washington. Since Kimball began its connection with the National Education Association Mastery in Learning Project in 1986, Mr. Towner has served two terms on the MIL Steering Committee. During this past year, he has also been Co-coordinator of the NEA/MIL PSInet Computer Network. Mr. Towner received his Bachelor's and Master's degrees in Psychology at the University of Washington.

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